

# DUBAI RESIDENTIAL REAL ESTATE Q4 2025 MARKET OVERVIEW



# KEY HIGHLIGHTS

- **Market activity cooled from Q3's peak, while off-plan retained clear leadership**

Q4 2025 registered around AED 138 billion in residential sales across 54,555 transactions, as volumes stepped down from the Q3 high of 42,800 units to 39,600 units, reflecting a reversion from elevated activity levels. Off-plan continued to lead activity and accounted for 75% of transaction value, while ready-market transactions remained within the 11,000 to 15,000 quarterly range.

- **Residential prices continued to increase, with price gains moderating toward year end**

Citywide residential prices continued to rise through Q4 2025, with price appreciation progressing at a more modest pace toward year end. Average apartment prices reached AED 1,860 per sq ft, while villa prices stood at AED 2,330 per sq ft. On a year-on-year basis, apartment prices increased by 13%, while villas recorded 15% annual growth, with quarter-on-quarter gains in Q4 remaining positive at 2% for apartments and 2.5% for villas.

- **Price performance became increasingly selective across locations**

Apartment price performance remained strongest in premium and master-planned areas such as Palm Jumeirah, Jumeirah, and Business Bay, while villa pricing recorded gains across MBR City, The Lakes, Emirates Hills, The Meadows, and Dubai Hills Estate, alongside selective adjustment in Jumeirah Islands.

- **Luxury residential transactions (AED 10 million and above) accounted for one quarter of total transaction value**

Luxury residential transactions totalled AED 35 billion across 1,600 units in Q4 2025, equivalent to 25% of total residential transaction value and 3% of total transaction volume. Off-plan luxury sales accounted for AED 23 billion, while ready-market luxury transactions totalled AED 12 billion, with villas accounting for the larger share of luxury transaction value across both segments.

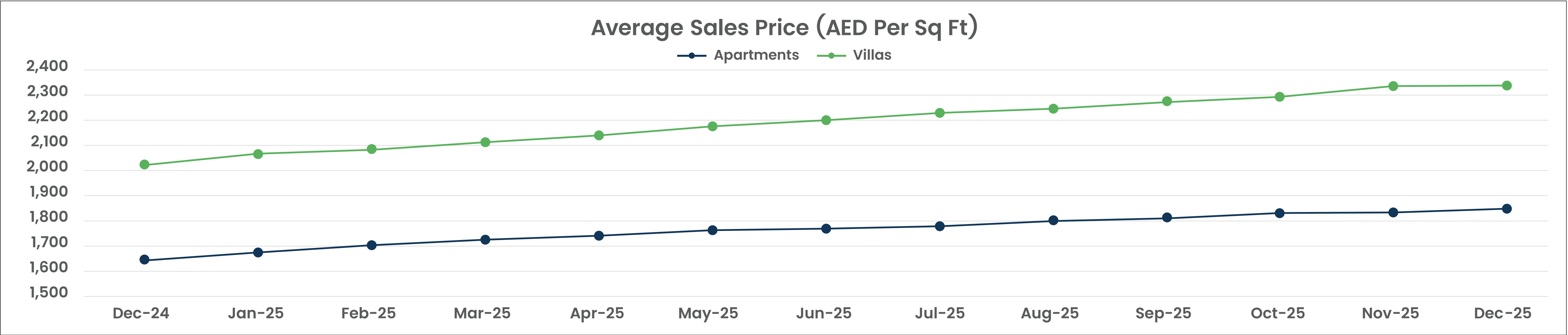
- **Supply delivery accelerated in Q4 2025**

Supply delivery accelerated in Q4 2025, with approximately 14,000 residential units completed, bringing total 2025 handovers to about 43,000 units. The forward supply pipeline into Q1 2026 totals approximately 23,900 units, of which roughly 83% are apartments and 17% are villas. Supply remains geographically concentrated in key sub-markets such as Dubai Marina, Jumeirah Village Circle, Business Bay, and Dubai Harbour.

- **Government-led initiatives focused on transaction execution and system integration**

During Q4 2025, initiatives led by the Dubai Land Department focused on implementation-level changes, including initial settlement of digital assets, cybersecurity coordination with other government entities, and integration of real estate transaction systems with wider government digital infrastructure.

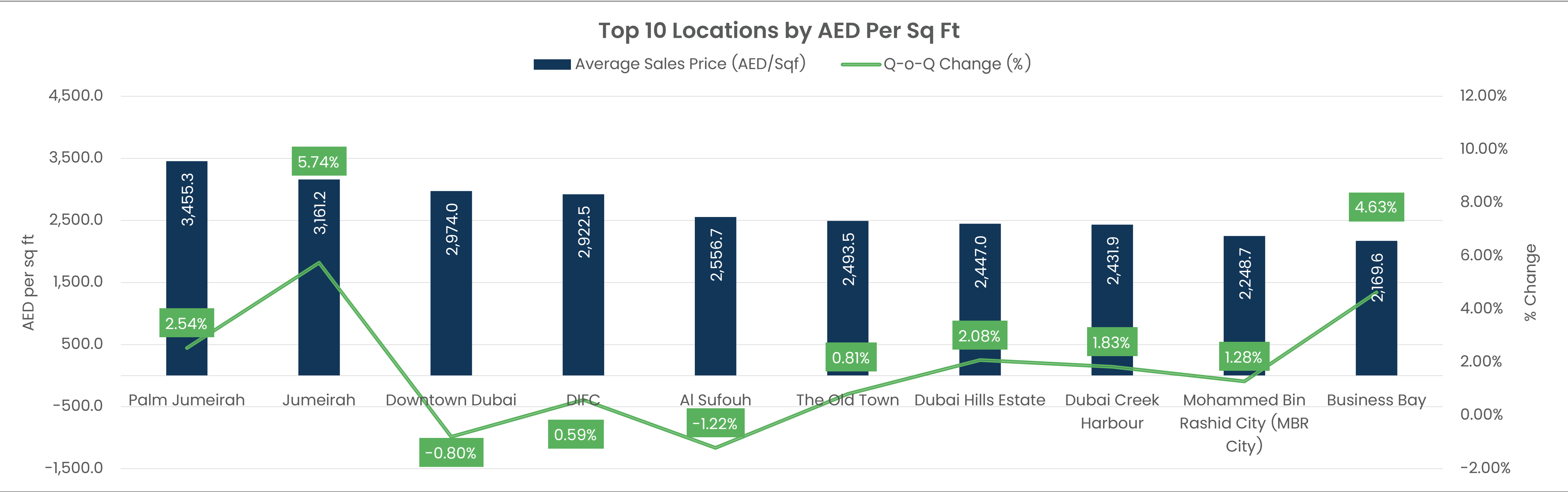
# REIDIN RESIDENTIAL CITY-WIDE SALES PRICE TREND



Apartments	1,647	1,674	1,703	1,725	1,741	1,763	1,769	1,778	1,802	1,814	1,830	1,839	1,853
Villas	2,024	2,065	2,085	2,113	2,140	2,176	2,200	2,229	2,246	2,276	2,299	2,328	2,331

- From early 2024 through the end of 2025, residential prices maintained an upward trajectory across both apartments and villas at the city-wide level, reflecting continued demand absorption across the market. Villas consistently outperformed apartments, delivering stronger price appreciation and a widening pricing gap between the two segments.
- On a year-on-year basis, apartment prices increased by around 13%, while villa prices recorded a stronger 15% increase, highlighting sustained demand for lower-density and premium housing formats.
- Quarter on quarter momentum into year end remained positive at the city-wide level, with price growth moderating toward year end, particularly within the apartment segment, as broader market averages increasingly reflected divergent performance across locations and project types.

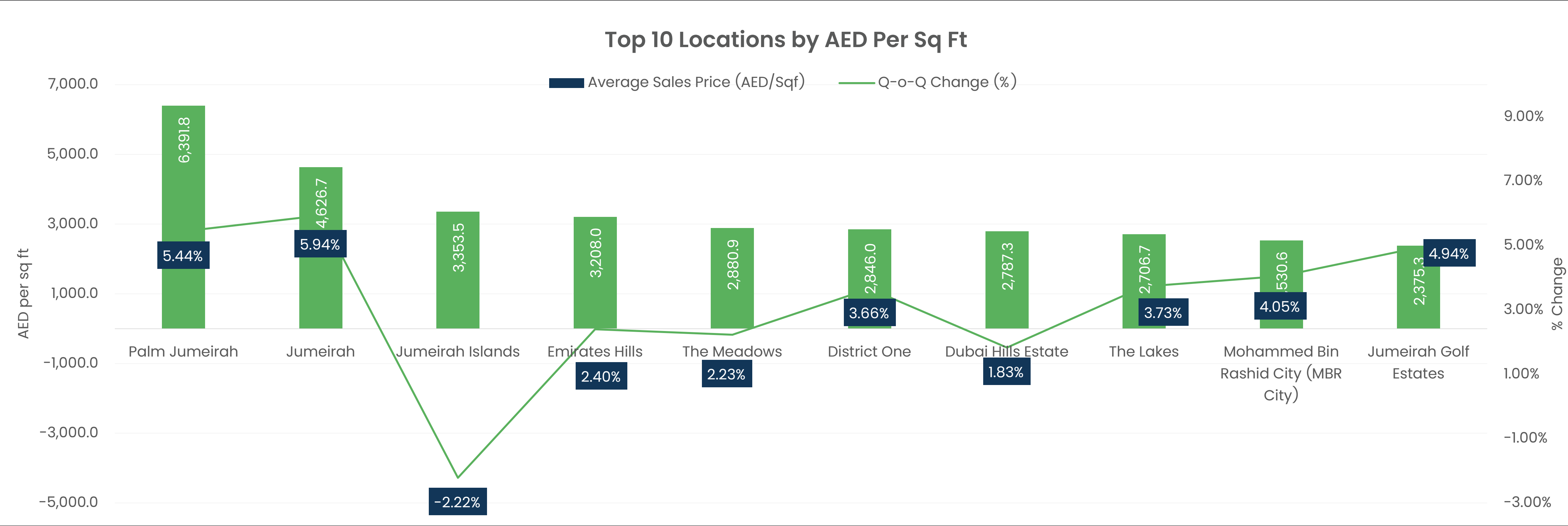
# REIDIN APARTMENTS SALES PRICE TREND



- Apartment prices across Dubai’s top sub-communities continued to increase in Q4 2025, though price performance varied meaningfully by location, reflecting increasing differentiation across mature core areas, premium coastal markets, and newer master-planned communities.
- Palm Jumeirah remained the highest-priced apartment market at around AED 3,450 per sq ft, recording around 2.5% quarter-on-quarter growth, while Jumeirah registered the strongest quarterly increase among the top locations at around 5.7%, indicating renewed price momentum in established, low-supply areas. Downtown Dubai and DIFC remained broadly stable over the quarter, with marginal price movements.
- Across well-established mixed-use and master-planned locations, Business Bay recorded a solid quarterly increase of around 4.6%, while Dubai Hills Estate and Dubai Creek Harbour posted more moderate gains of around 2%, reflecting steady absorption in large-scale planned communities.

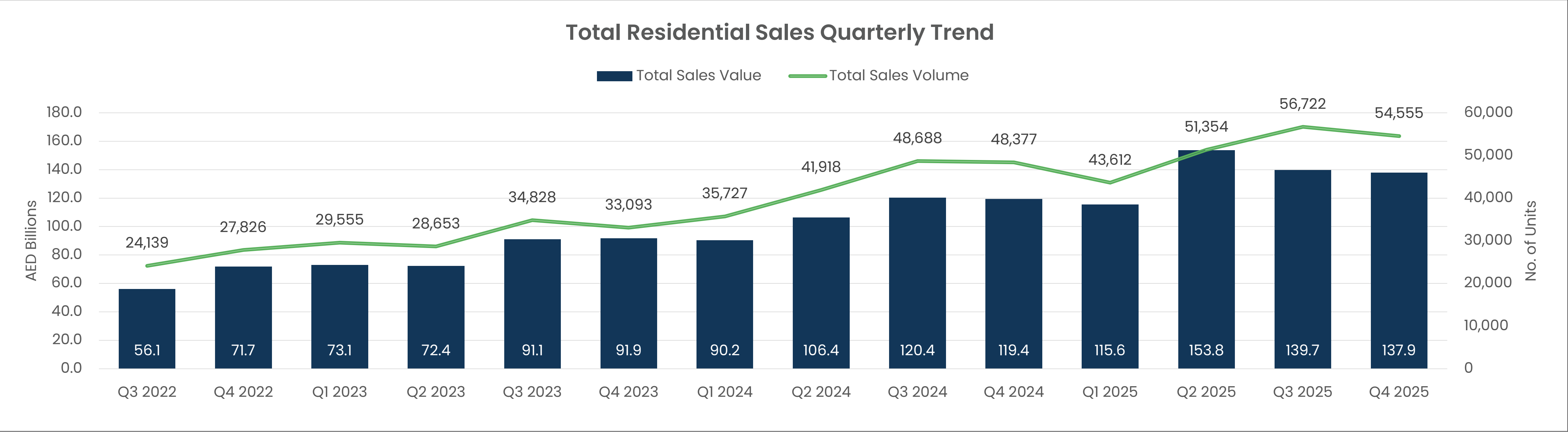


# REIDIN VILLA SALES PRICE TREND



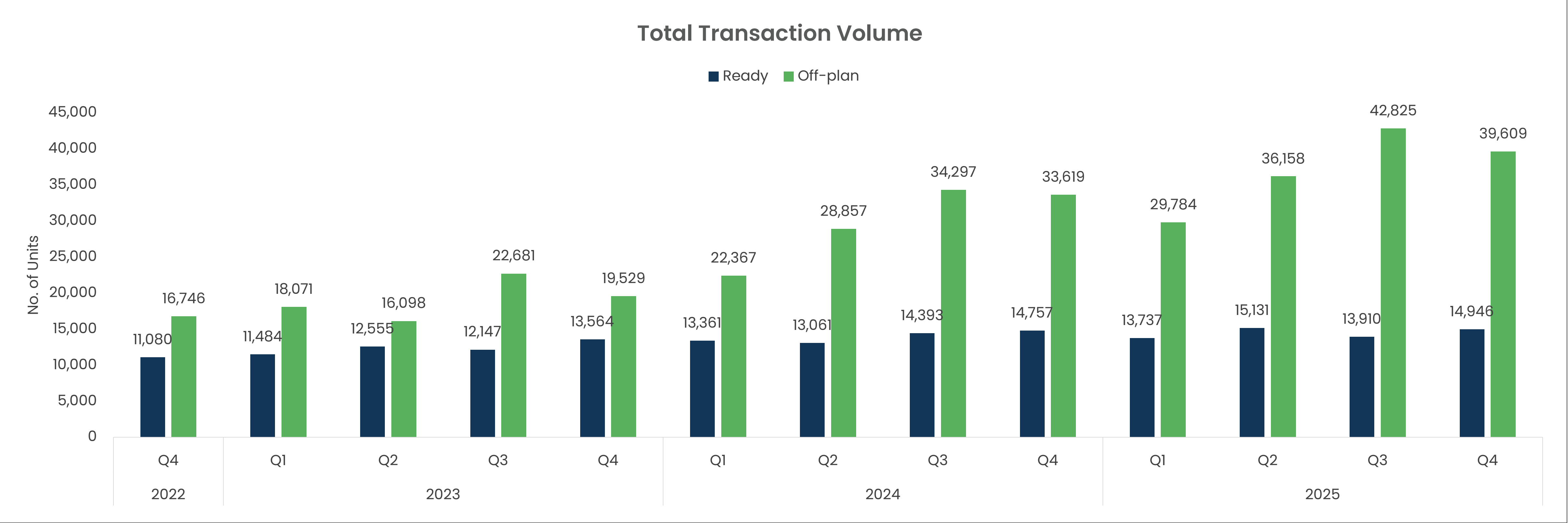
- Villa prices across Dubai’s top residential locations recorded quarterly increases in Q4 2025, indicating continued strength across established villa markets.
- Palm Jumeirah and Jumeirah remained the highest priced villa locations, posting quarter-on-quarter gains of around 5% to 6%, while communities such as District One, The Lakes, Emirates Hills, The Meadows, Dubai Hills Estate, and MBR City recorded positive price growth in the 2% to 4% range.
- Jumeirah Islands was the only location to record a modest quarterly decline of around 2%.

# TOTAL SALES TRANSACTIONS QUARTERLY TREND



- Q4 2025 recorded around AED 138 billion in residential sales value across 54,555 transactions, following the Q3 peak, with both value and volumes easing quarter on quarter.
- Transaction volumes declined modestly from Q3 highs, but remained well above pre 2024 levels, reflecting a reversion from elevated activity rather than a break in market participation.
- Sales value softened slightly quarter on quarter, reflecting a change in transaction mix following the mid year peak, rather than a broad based reduction in activity.
- Across 2025, residential transactions remained elevated and consistent, with quarterly volumes largely sustained above 50,000 transactions, compared to around 22,000 to 28,000 transactions per quarter in 2022.

# TOTAL SALES TRANSACTIONS QUARTERLY TREND - VOLUME



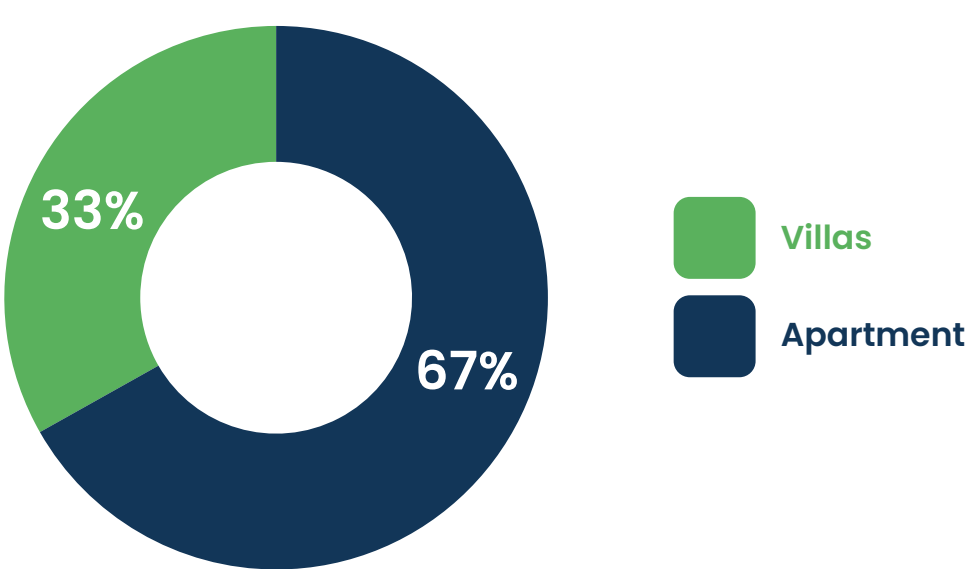
- Total residential transaction volumes increased materially from late 2022 through 2025, driven primarily by growth in off plan sales activity, even as off plan pricing in most locations remained higher than comparable ready market stock.
- Q3 2025 marked a cycle high at 42,825 transactions, with volumes easing to 39,609 transactions in Q4 2025, reflecting a reversion from elevated activity levels.
- Ready market volumes have remained broadly unchanged, consistently ranging between around 11,000 and 15,000 transactions per quarter, while off plan transactions accounted for nearly all incremental volume growth over the period.

# TOTAL SALES TRANSACTIONS BY TYPOLOGIES & LOCATIONS

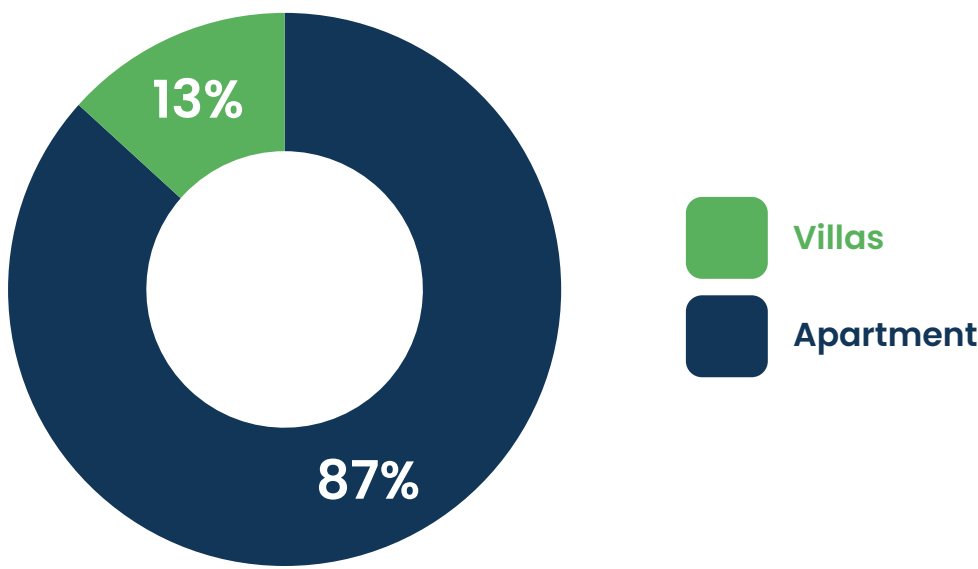
## TOTAL VOLUME & VALUE

Sales Transactions	Total Value (AED Bn)	Total Volume
Apartment Sales	92.3 bn	47,299
Villa Sales	45.6 bn	7,256
Grand Total	137.9 Bn	54,555

## TOTAL VALUE (AED BN)



## TOTAL VOLUME



## TOP 10 LOCATIONS BY VALUE

Dubai Investment Park Second	8.3 Bn
Business Bay	7.9 Bn
Dubai Islands	5.3 Bn
Palm Jumeirah	5.2 Bn
Downtown Dubai	5.1 Bn
Jumeirah Village Circle	5.0 Bn
Nad Al Shiba First	4.5 Bn
Dubai Maritime City	4.3 Bn
Dubai Hills Estate	4.0 Bn
Palm Jebel Ali	3.2 Bn

## TOP 10 LOCATIONS BY VOLUME

Jumeirah Village Circle	4,472
Business Bay	2,898
Dubai Investment Park Second	2,864
Jumeirah Village Triangle	2,327
Dubailand Residence Complex	2,175
Majan	2,147
Dubai Science Park	1,723
Dubai Maritime City	1,648
Dubai Islands	1,464
Downtown Dubai	1,281



# Sales Sequence: Primary vs Secondary Market Overview

## Primary and Secondary Sales Split

Transaction Type	Total Value (AED Bn)	Total Volume
Primary Sales	91.7 Bn	38,740
Secondary Sales	46.2 Bn	15,815
Grand Total	137.9 Bn	54,555

## Primary Sales Split by Property Type

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	68.2 Bn	34,907
Villa Sales	23.5 Bn	3,833
Grand Total	91.7 Bn	38,740

## Secondary Sales Split by Property Type

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	24.1 Bn	12,392
Villa Sales	22.1 Bn	3,423
Grand Total	46.2 Bn	15,815

# TRANSACTION TYPE: OFF-PLAN VS READY MARKET OVERVIEW

## OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Total Volume
Off-Plan Sales	98.7 Bn	39,609
Ready Sales	39.2 Bn	14,946
Grand Total	137.9 Bn	54,555

## OFF-PLAN SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	70.1 Bn	34,949
Villa Sales	28.6 Bn	4,660
Grand Total	98.7 Bn	39,609

## READY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	22.2 Bn	12,350
Villa Sales	17.0 Bn	2,596
Grand Total	39.2 Bn	14,946

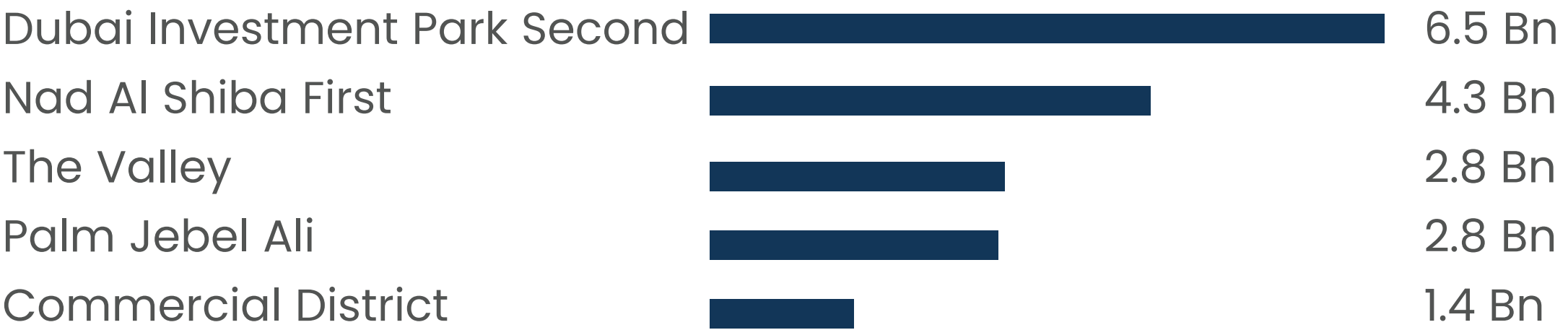


# OFF PLAN MARKET

## TOP 5 OFF-PLAN APARTMENTS' LOCATIONS BY VALUE



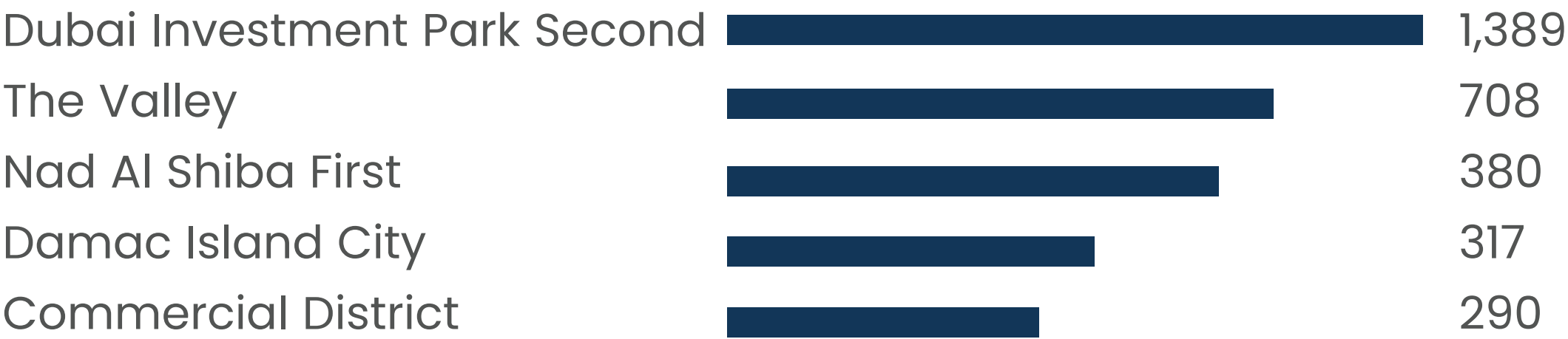
## TOP 5 OFF-PLAN VILLAS' LOCATIONS BY VALUE



## TOP 5 OFF-PLAN APARTMENTS' LOCATIONS BY VOLUME



## TOP 5 OFF-PLAN VILLAS' LOCATIONS BY VOLUME



# READY MARKET

## TOP 5 READY APARTMENTS' LOCATIONS BY VALUE



## TOP 5 READY VILLAS' LOCATIONS BY VALUE



## TOP 5 READY APARTMENTS' LOCATIONS BY VOLUME



## TOP 5 READY VILLAS' LOCATIONS BY VOLUME





# OVERALL TICKET SIZE SPLIT BY TYPOLOGIES

## TICKET SIZE SPLIT OF APARTMENT SALES

Sales Transactions	Total Value (AED Bn)	Total Volume
< 1 Mn	10.7 Bn	15,105
1 – 2 Mn	26.4 Bn	19,019
2 – 3 Mn	17.2 Bn	7,204
3 – 5 Mn	14.9 Bn	3,987
5 – 10 Mn	9.3 Bn	1,392
> 10 Mn	13.7 Bn	592

## TICKET SIZE SPLIT OF VILLA SALES

Sales Transactions	Total Value (AED Bn)	Total Volume
< 1 Mn	0.2 Bn	227
1 – 2 Mn	0.8 Bn	519
2 – 3 Mn	2.9 Bn	1,107
3 – 5 Mn	12.1 Bn	3,121
5 – 10 Mn	8.7 Bn	1,289
> 10 Mn	20.9 Bn	993

# LUXURY MARKET OVERVIEW

## KEY TAKEAWAYS

- Luxury residential transactions totalled around AED 34.6 billion across 1,585 units in Q4 2025, increasing from Q3 and accounting for approximately 25% of total residential transaction value while representing around 3% of total transaction volume.
- Off plan activity accounted for roughly two thirds of luxury market value and volume, totalling around AED 22.8 billion across 1,066 units, while ready market luxury transactions totalled around AED 11.8 billion across 519 units.
- Villas accounted for the majority of luxury transaction value across both segments. In the off plan market, villas contributed around AED 12.4 billion across 636 units, compared to around AED 10.3 billion across 430 apartment units. In the ready market, villas totalled around AED 8.5 billion across 357 units, versus around AED 3.3 billion across 162 apartment units.
- Luxury activity remained concentrated across a limited number of prime locations, with off plan sales led by Nad Al Sheba First, Palm Jebel Ali, La Mer, Jumeirah Second, and Business Bay, and ready market activity centred on Palm Jumeirah, Dubai Hills Estate, District One, Al Barari, and Emirates Hills.
- The execution of 15 residential transactions above AED 100 million in Q4 2025 underscores repeatable ultra-prime liquidity within Dubai's luxury residential market, moving beyond episodic high-value deals.

\* Luxury ≥ AED 10M



# LUXURY MARKET OVERVIEW

## OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Total Volume
Off-Plan Sales	22.8 bn	1,066
Ready Sales	11.8 bn	519
Grand Total	34.6 bn	1,585

## OFF-PLAN SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	10.3 bn	430
Villa Sales	12.4 bn	636
Grand Total	22.8 bn	1,066

## READY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	3.3 bn	162
Villa Sales	8.5 bn	357
Grand Total	11.8 bn	519

\* Luxury ≥ AED 10M

# LUXURY MARKET OVERVIEW

## TOP 5 OFF-PLAN LUXURY COMMUNITIES BY VALUE & VOLUME

Location	Value (AED Bn)	Volume
Nad Al Shiba First	3.1 Bn	194
Palm Jebel Ali	2.8 Bn	97
La Mer	2.8 Bn	81
Jumeirah Second	1.6 Bn	43
Business Bay	1.3 Bn	43

## TOP 5 READY LUXURY COMMUNITIES BY VALUE & VOLUME

Location	Value (AED Bn)	Volume
Palm Jumeirah	2.3 Bn	68
Dubai Hills Estate	1.1 Bn	42
District One	0.8 Bn	28
Al Barari	0.8 Bn	24
Emirates Hills	0.7 Bn	8

\* Luxury ≥ AED 10M



# LUXURY MARKET OVERVIEW

## 5 MOST EXPENSIVE TRANSACTIONS OF Q4 2025 -- APARTMENTS

Sale Month	Project Name	Location	Developer	Sale Value (AED)	Average Price/ Sq ft	Sales Sequence	Transaction Type
December	Bugatti Residences	Business Bay	Binghatti	550.0 Mn	11,652	Primary	Off-plan
November	Jumeirah Residences Asora Bay	La Mer	Meraas	203.0 Mn	7,950	Primary	Off-plan
November	Four Seasons Private Residences DIFC	DIFC	H&H	192.5 Mn	10,600	Secondary	Ready
October	Bulgari Lighthouse Dubai	Jumeirah Bay Island	Meraas	155.0 Mn	13,296	Primary	Off-plan
December	Aman Residences Tower 1	Jumeirah Second	H&H	144.7 Mn	16,831	Primary	Off-plan

## 5 MOST EXPENSIVE TRANSACTIONS OF Q4 2025 -- VILLAS

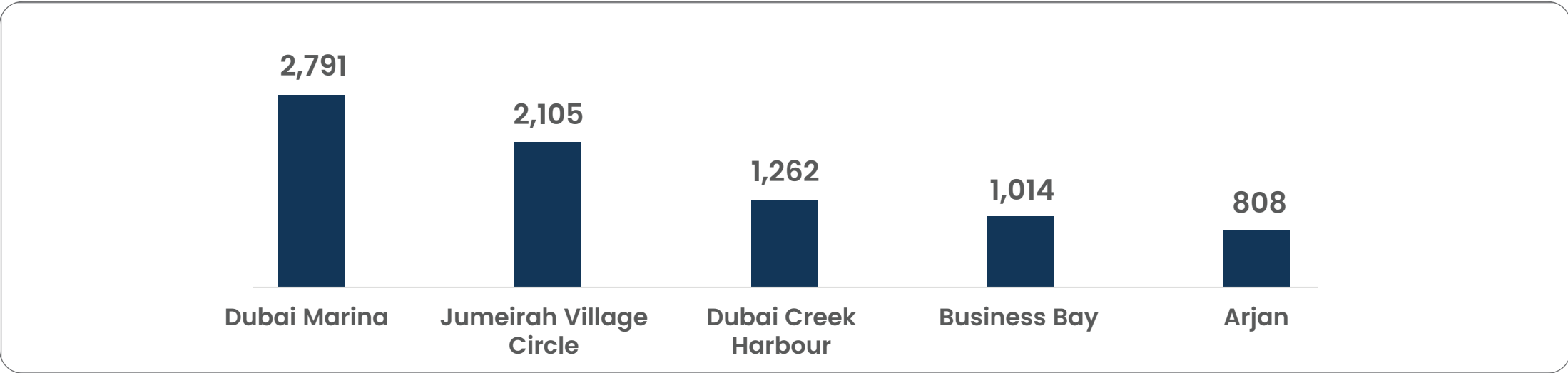
Sale Month	Project Name	Location	Developer	Sale Value (AED)	Average Price/ Sq ft	Sales Sequence	Transaction Type
December	Emirates Hills – Sector V	Emirates Hills	Emaar	233.5 Mn	24,520	Secondary	Ready
October	Rosewood Residences Dubai	Jumeirah Second	Agarwood	220.0 Mn	8,611	Primary	Off-plan
December	Signature Villas Frond N (Al Naghal)	Palm Jumeirah	Nakheel	195.0 Mn	27,857	Secondary	Ready
December	Emirates Hills – Sector L	Emirates Hills	Emaar	123.6 Mn	8,571	Secondary	Ready
December	Emerald Hills	Dubai Hills Estate	Emaar	120.0 Mn	15,095	Secondary	Ready

# COMPLETED & UPCOMING SUPPLY OVERVIEW

## COMPLETED & UNDER CONSTRUCTION UNITS

Status	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Completed Units	11,546	9,706	7,909	14,024	
Under Construction Units					23,903
Total Units (2025 Handover)	43,185				

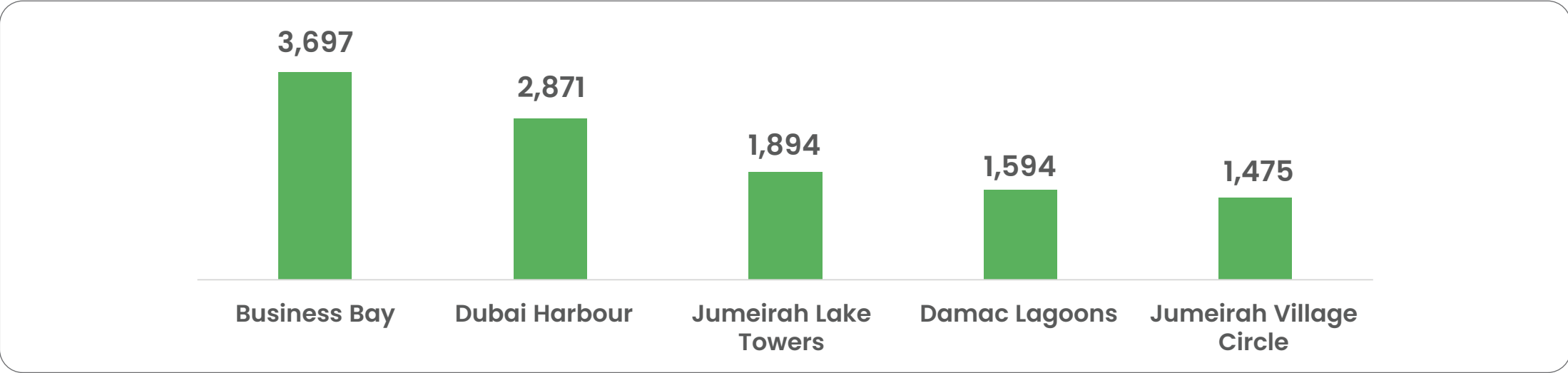
## TOP COMPLETED SUPPLY LOCATIONS IN Q4 2025



## COMPLETED UNITS IN Q4 2025 BY PROPERTY TYPE

Property Type	Completed Units
Apartments	12,282
Villas	1,742
Total	14,024

## TOP HANDOVER LOCATIONS ANNOUNCED BY DEVELOPERS IN Q1 2026



## DEVELOPER ANNOUNCED HANDOVER UNITS IN Q1 2026 (BY PROPERTY TYPE)

Property Type	Under Construction Units
Apartments	19,836
Villas	4,067
Total	23,903





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